

## Chapter 12: Forms

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### Summary

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Following are examples of some of the forms used frequently by DRS. Some of the forms include detailed instructions and other important information, so be sure to check for additional pages. You may photocopy or download these forms if you do not have one and need one for immediate use.

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### Forms Available in the Forms Archive on the Web site

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The Forms Archive is designed to provide easy access to many of our more commonly used forms. All forms are in PDF format. We have provided a link to download Adobe Acrobat, so you can access the form files. You can view, print or complete the forms on line. The forms must be printed and signed at your site. Unless otherwise indicated, mail the signed original to the address indicated below. The Web site location is <http://www.wa.gov/DRS/forms/>.

- Authorization for Direct Deposit—*use this form to have your retirement benefit deposited directly into your personal bank account.*
- Beneficiary Designation—*use this form to document beneficiary information in case of death prior to retirement*
- Beneficiary Designation—**for LEOFF and WSPRS retirees only**—*use this form designate or change your beneficiary(s) eligible to apply for benefits under Chapter 226, Laws of 1996 only.*
- Credit Redistribution—*use this form to redistribute previous payments.*
- Enrollment Form—*use this form for initial enrollment in a DRS-administered retirement system*
- Final Compensation Report—*Use this form to provide information DRS needs to calculate the benefits for a retiring member of PERS Plan 1. A political subdivision also uses this form for a sick leave cashout at retirement.*

- Name/Address Change—use this form to inform DRS of a name change or to update your mailing address with DRS only if you are not using multiple record layout.
- Payment Advice—use this form to report Plan 1 and Plan 2 payments to DRS.
- Plan 3 Payment Advice—use this form to report payments for **Plan 3 only**.
- Position Eligibility Worksheet—use this form as an aid in determining position eligibility.
- Prelist Supplement Form—Insert this form into the prelist where you need extra pages.
- Proof of Earnable Compensation—use for TRS only to finalize the member's account for retirement.
- Request for Payment of Defined Contribution Funds (booklet)—describes your options for taking payment of funds in a TRS Plan 3 defined contribution account.
- Retiree Returning to Work Report—use this form to report the retirement system in which the retiree is working.
- Retirement Status (required by RCW 41.50.139)—reports if member has been a member or retired from a Washington State retirement system.
- TRS Plan 1 Retiree Returning to Work Report—Use this form to report any TRS Plan 1 retiree who is working for you.
- TRS Plan 3 Change of Investment Program—TRS Plan 3 members use this form to select a new investment program for future contributions; this form should be turned in to the employer.
- TRS Plan 3 Member Information—Use this form, in addition to the Enrollment Form, during initial enrollment in TRS Plan 3.
- Withdrawal of Retirement Contributions (not for Plan 3)—members use this form to withdraw or transfer their employee contributions when they separate from service.

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## Forms not Available on the Web Site

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- Transmittal Correction Form: *Use this form to correct reporting errors from previous transmittals.*
- TRS Plan 3 Transmittal Correction Form: *Use this form to correct reporting errors from previous transmittals **for Plan 3 only**.*
- Verification of Employment form: *This form is generated by DRS to verify an employee's salary and hours for a specified period.*

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## Mailing Completed Forms

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Mail all completed forms (unless otherwise noted) to the address shown below:

DEPARTMENT OF RETIREMENT SYSTEMS  
PO BOX 48380  
OLYMPIA WA 98504-8380

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## Questions Regarding Forms?

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If you have questions about the form, please contact the DRS Central Reception Unit, who will direct your call to the appropriate person, or you may contact ESS.

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## Need Additional Forms?

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For bulk quantities of forms, please call the DRS Mailroom at (360) 664-7066 or on the toll free number, 1-800-547-6657. You may also request forms on E-mail at **drsforms@drs.wa.gov**.

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